

2nd Working Group Meeting
Cluster: Customer Relations and Marketing
4th – 5th October 2007
Minutes

List of participants

Molnar, Balazs	MÁV (Hungarian State Railways)	Expert
Dimitrov, Petko	Institute of Transport and Communications Ltd.	Expert
Herrero, Jesús	Empresa Municipal de Transportes de Valencia (EMT Valencia)	Expert
Monkiewicz, Slavomir	Biuro Planowania Rozwoju Warszawy	Expert
Peceny, Ondrej	Prague Transport Operator (DPP)	Expert
Rybarczyk, Włodzimierz	City of Warsaw	Expert
Sarman, Viorica Aurelia	Uniunea Romana de Transport Public	Expert
Svoboda, Jan	Prague Transport operator (DPP)	Expert
Tonks, Phil	Bus users UK	Expert
Carles-Tolrà, Jorge	Transports Metropolitans Barcelona (TMB)	Cluster partner
Barta, Franz	Socialdata	Cluster leader
Erl, Erhard	Socialdata	Cluster leader

The second WG meeting of the “Customer Relations and Marketing” cluster took place on the 4th and 5th of October 2007 in Zagreb. The main objective of the meeting was to discuss PT image and awareness in Europe, especially in countries in transition, and of ways to improve both image and awareness. The entire meeting was hosted by UITP, while the customer relations and marketing related meeting was moderated and recorded by Socialdata.

The working group meeting started on the 4th of October with a short introduction of the participants and the presentation of the objectives of the meeting. Five of the nine experts participating in the meeting were already at the 1st WG meeting in Sitges while four experts were new to the group. The overall aims of the meeting were to discuss the situation of public transport image and awareness in Europe in general and in countries in transition in particular. Besides this good practice examples were collected and reviewed and together we tried to set up guidelines to improve the image and awareness of public transport.

Objectives of the meeting:

- Identification of key challenges (public transport image and awareness)
- Discussion of image and awareness deficits
- Identification and discussion of possible improvements
- Presentation of good practice examples
- Formulation of key guidelines for improving public transport image and awareness

In advance of the meeting a questionnaire was sent to all experts invited to the meeting and the meeting started with a short presentation of the outcomes of the expert survey. The outcomes of this survey (4 filled in questionnaires) were presented immediately after the introduction session:

- All respondents were convinced that it would be possible to increase public transport ridership in their city
- Personal assessment of the experts of the importance of public transport for day-to-day activities and community life was higher than their guess of what the public thinks; however both assessments pointed out that public transport was (very) important.

- Assessment of public transport image by experts and public was more or less neutral with a slightly better assessment by experts than public.
- All respondents think that it would be important to improve the image of public transport to increase patronage, convince decision makers and improve customer satisfaction
- The respondents were all from countries in transition and in their countries authorities take the responsibility for image improvements sometimes but not always with support from the local public transport operators. This is quite different from Western Europe where the operators often take the lead role in this regard.
- Public transport image improvements are mostly limited to advertising, only some also use public relation campaigns
- Image improvements were often connected with hard measures like new infrastructure and rolling stock. But also driver training and awareness improvements were mentioned.
- Most respondents said that the actual state of public transport is better than their image which clearly points out the need to improve the image before further service improvements
- Unfortunately transport policies in the respondents cities do not reflect the importance which is placed on them by their citizens mostly because most decision makers think that the public exclusively favour the car.
- This is partly caused by the fact that the public transport image is not good enough for its importance and that the still high public transport usership stops decision makers and public transport operators to improve the image.
- As a result if decisions have to be made between investments in motorised transport and investments in public transport most decision makers favour road investments. Partly because they themselves are car drivers and partly because they think that the public favours the car. If investments in public transport are made they focus too strongly on heavy rail and underground. Investments in bus services are often neglected.

These outcomes of the survey sparked some interesting discussions within the group with experts pointing out similarities and differences in their cities (countries) to these outcomes. However the similarities prevailed.

Situation of public transport image (and awareness) in different cities (countries):

The number of captive users (no alternatives to using public transport available) of public transport is continuously decreasing in all European cities and in a lot of Western European cities non captive users already dominate public transport ridership. While it may not be necessary to improve the image for captive users it is very important for non captive users to have a positive image of public transport as it influences their daily decision whether to use public transport. In this context the public transport image is nothing static it is created newly on a daily basis taking into account things like opinions of other users, changing whether conditions and the latest experience with using public transport etc.

There is often a difference between the image of the service and of the companies providing the service. A recent survey of Prague residents for example revealed that people in Prague while thinking public transport services in their city are good they also think that the public transport operator is not so good. The image associated with the company is “communist”, the respondents also pointed out that the company is not transparent enough and that it seems to them that the management is handling the company as it did in the communist era.

Some pointed out that simply by improving the service it would be possible to give public transport a good image and make it competitive against its competitors in the transport sector and mainly the car. This was strongly disputed by others as there are a lot of examples in the business world

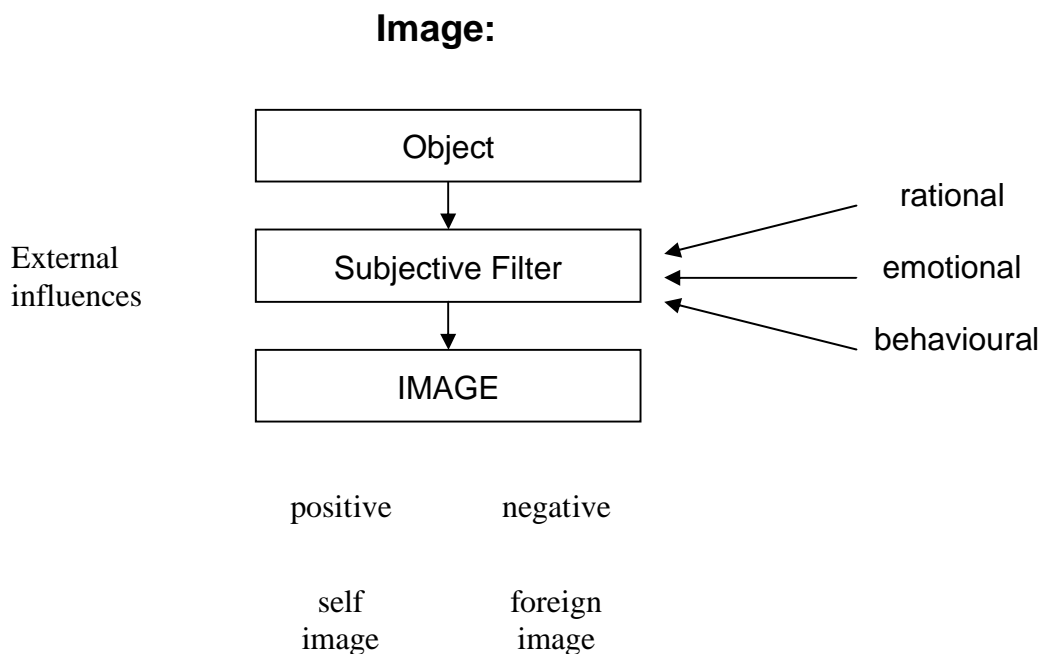
where the better product did not result in better sales (i.e. Microsoft versus Apple). As important as the product is also how you communicate it to the public.

Public transport image has to be improved in the eye of decision makers however it is as important to change it in the eye of public transport operators (management) who still mostly see public transport as a social service and their users are captive users (no alternative). It is really important to get a positive image in the eye of decision makers (especially politicians) in order to secure both additional funds and support for public transport.

For a long time public transport has been viewed as a social service. Now with rising ticket prices public transport has to get away from this image in order to justify these rising ticket prices and at the same time become a serious competitor in the transport market.

In order to improve its image public transport has to advertise its strengths instead of trying to compete with the car in areas it cannot win like privacy and comfort. It also has to be more self confident following the example of other actors in the transport market, for example while congestion is a big problem for urban car traffic nobody in car advertisements is talking about it.

The following chart was presented and then discussed at the meeting to show how an image is created:



An image can be related to different things (i.e. single bus line, public transport services (network), PT operator, PT authority...). However how an image is normally created is quite similar. At the beginning there is always an object which after running through a subjective filter is then associated with an image. According to social science the main influencing factors determining the subjective filter are rational, emotional and behavioural decisions with the emotional factors/decisions being the most important ones in creating an image. An image can be positive or negative but in most cases it includes both positive and negative associations. The image can be a self image (i.e. by users, employees) or a foreign image (i.e. by non-users).

However to build a positive image for public transport is really difficult if there are no clear organisational structures and the possibility for long term planning. Examples from UK come to mind where different operators are competing on the same lane increasing confusion in the public. This situation and fast changes of operators (or only the risk of) reduce the interest of public transport companies to invest in image campaigns.

An exercise was implemented together with the experts in which they wrote down positive and negative associations towards public transport. The outcomes of this exercise are put together in the following tables.

Negative associations with public transport image	Number of remarks	Actions required
Slow	7	Changing wrong impressions regarding travel time of public transport and car trips; Install separated bus lanes
Complicated to use	6	Provide information materials
Dirty	5	Improve cleaning
Crowded	4	More services during peak times; Information about alternative routes
Unreliable	4	Improve operational management; Provision of on-time information
Missing information	4	Getting information materials to users instead of waiting for them to get it
Expensive	4	Changing wrong impressions regarding costs of public transport and car travel
Buying tickets too complicated	3	Provide information on how to get tickets
Negative image	3	Image campaigns
Tariffs not understandable	2	Provision of information; Simplifying ticketing system
Safety insufficient	2	Provision of information
Less comfortable	2	Comfort improvements
Unfriendly personal	1	Staff training
Missing info with disturbances	1	Management of disturbances
Eating in busses	1	Change of rules
Bad accessibility	1	Improvement of accessibility (Low floor buses, etc)

Positive associations with public transport image	Number of remarks
Being able to do other things	6
No parking space necessary	6
Cheaper than car travel	5
Not necessary to wait in congestion	4
Faster than car travel	4
Good reliable service	4
Environmentally friendly	3
Meeting people	3
Possibility to drink	3
Looking around	2
Safe	2
Positive image	1
Less space consumption	1
Less stressful	1
Physical activity	1

A presentation of Jorge Carles-Tolra from Transports Metropolitans de Barcelona (TMB) showed a number of good practice examples for image campaigns and also identified the reasons for implementing an image campaign and how to monitor its success. The full PowerPoint presentation can be found on the SPUTNIC website. This was followed by a presentation of Viorica Sarman from the Romanian Association of Public Transport URTP presenting the outcomes of a survey on public transport image measures in Romania and showing the ongoing awareness improvements measures. The full PowerPoint presentation can be found on the SPUTNIC website.

After the presentation and discussion of these two good practice examples from Barcelona and Rumania the experts were split up into two groups and asked to develop an image campaign following a defined structure:

Image campaign 1:

- **Strategic background:** Example of Warsaw and other Polish cities with public transport authority operating metro, tram and bus services. The main operator is responsible for roughly 80% of the services and the authority handles timetables, public transport information and ticket sales. The image campaign is handled by the public transport operator and the main target is to reduce the reduction of public transport modal share.
- **Objective:** Increase number of public transport passengers. The campaign targets mainly car users as potential public transport users
- **Market segmentation:** Existing users of public transport (differentiated in captive and non-captive users) and potential new users
- **Costs/budget:** Limited budget

- **Media mix:** Local radios to target car drivers; Advertisements on busses and trams, shopping malls, railway stations and airports; Concentration on information provision (PT travel guide) with information on what tickets to use, how to buy tickets, how to use public transport and where to get time-tables.
- **Messages:** Public transport is more convenient than car travel; No need to pay for parking and to find parking spaces; no traffic jams; being able to use time differently
Slogan: “Leave your car use PT”
- **Evaluation:** Passenger counts in corridors; Surveys with interviews (however this depends on availability of necessary funds).

Image campaign 2:

- **Strategic background:** Medium sized city with two universities and increasing number of students; Parking around the campus becomes a problem
- **Objective:** Increase public transport ridership; Increase awareness of public transport company and improve how the company is perceived by the students
- **Market segmentation:** 15 to 25 year olds who are either already students or still in high school; Two campuses
- **Costs/budget:** Low level budget
- **Media mix:** Posters in University buildings; Sponsoring of events; Leaflets on car windows parked around the universities; SMS advertising; Information on university websites
- **Messages:** It’s cool to use public transport; Cool image of public transport and of using public transport; Main emphasis on sincerity of the campaign
- **Evaluation:** Survey (students)

A presentation of Erhard Erl from Socialdata on awareness of public transport illustrated the general principles of awareness rising and pointed out which aspects have to be targeted to improve awareness of public transport.

Guidelines for improving public transport image and awareness:

- It is necessary to start with image improvements as soon as possible partly because it is such a long term effort but also because it is more cost effective (comparatively cheap with infrastructure measures and new rolling stock)
- Common agreement that public transport services in countries in transition are better than their image. This also speaks in favour of starting with image and awareness campaigns first
- In order to get additional funds (both hard and soft measures) it is really important to improve image and awareness in the eyes of decision makers.
- Being more self confident is a necessity and fully justified by the huge advantages of public transport against other modes of transport (Key word: “self confidence”).
- There are developments in the fields of fighting climate change and obesity which are really in favour of public transport. Public transport has to get on the train and run with the flow instead of fighting trends.
- How to get messages to the users should be handled by experts either in-house or if knowledge is not yet available by external experts/consultants.
- In the cases where different public transport companies compete in a city all of them have to contribute to a positive image of public transport; this does not stop each company to develop their individual company related brand.
- Handling media contacts is not always easy. However keeping the media in the loop and providing them with information reduces the risk of negative press.
- Improving awareness of non-users is really important even though the current users remain the main target of any campaign.

- Image campaigns always have to reflect the actual situation of public transport (i.e. campaigns giving the impression that people will be able to use lavishly furnished and not overcrowded trains for commuting while in reality they are old and overcrowded are really contra productive)
- It is necessary to correct wrong perceptions of both customers and non-customers regarding cost/time for using public transport and for using the car.
- With increasing motorisation rates the number of captive users will decrease making it necessary to transform the current captive users into satisfied customers before they are no longer captive and change to travelling by car. It is always easier and cheaper to invest in keeping current users than recruiting new ones.
- “Image has to improve based on emotional values”
- Quality management and image improvement are two closely related topics.
- In order to improve the image and to increase the use of public transport it is really important for public transport operators and authorities to know their customers.
- Drivers and conductors are the first ones that have to be convinced of public transport service and image. They then can act as multipliers communication this positive image/information to the customers. This would also be a really cost effective way of marketing.

The working group meeting ended with a summary of the discussion output which were presented at the following plenary session.